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ABSTRACT

Urban districts around the United States are attempting systemic change by offering schools a "menu" of externally developed school reform designs. Yet, how do faculties who are relatively unfamiliar with the designs choose among them? This question is addressed by analyzing qualitative data collected in the Memphis City Schools (Tennessee), a New American Schools scale-up jurisdiction, within a framework of sociological theory on organizations. Data were collected at six schools, each of which was using a different restructuring design. Interviews were held with principals and with 8 to 10 teachers in each school. Findings show that schools seldom made well-informed, free choices about restructuring designs, even when opportunities to gather information were readily available. Instead, schools' reform choices were characterized by bounded rationality or a desire for legitimacy, and were sometimes governed by normative factors and power relations rather than functional calculations. Implications for how schools and districts can make better choices about reform designs are discussed. An appendix describes the eight restructuring designs used in the Memphis schools in 1996-97. (Contains 39 references.) (SLD)

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HOW SCHOOLS CHOOSE EXTERNALLY DEVELOPED REFORM DESIGNS

Amanda Datnow

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Report No. 35

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The Center

Every child has the capacity to succeed in school and in life. Yet far too many children, especially those from poor and minority families, are placed at risk by school practices that are based on a sorting paradigm in which some students receive high-expectations instruction while the rest are relegated to lower quality education and lower quality futures. The sorting perspective must be replaced by a "talent development" model that asserts that all children are capable of succeeding in a rich and demanding curriculum with appropriate assistance and support.

The mission of the Center for Research on the Education of Students Placed At Risk (CRESPAR) is to conduct the research, development, evaluation, and dissemination needed to transform schooling for students placed at risk. The work of the Center is guided by three central themes — ensuring the success of all students at key development points, building on students' personal and cultural assets, and scaling up effective programs — and conducted through seven research and development programs and a program of institutional activities.

CRESPAR is organized as a partnership of Johns Hopkins University and Howard University, in collaboration with researchers at the University of California at Santa Barbara, University of California at Los Angeles, University of Chicago, Manpower Demonstration Research Corporation, University of Memphis, Haskell Indian Nations University, and University of Houston-Clear Lake.

CRESPAR is supported by the National Institute on the Education of At-Risk Students (At-Risk Institute), one of five institutes created by the Educational Research, Development, Dissemination and Improvement Act of 1994 and located within the Office of Educational Research and Improvement (OERI) at the U.S. Department of Education. The At-Risk Institute supports a range of research and development activities designed to improve the education of students at risk of educational failure because of limited English proficiency, poverty, race, geographic location, or economic disadvantage.

Abstract

Urban districts around the United States are attempting systemic change by offering schools a "menu" of externally developed school reform designs. Yet, how do faculties who are relatively unfamiliar with the designs choose among them? This question is addressed by analyzing qualitative data collected in Memphis City Schools, a New American Schools scale-up jurisdiction, within a framework of sociological theory on organizations. Findings show that schools seldom made well informed, free choices about restructuring designs, even when opportunities to gather information were available. Instead, schools' reform choices were characterized by bounded rationality or a desire for legitimacy, and were sometimes governed by normative factors and power relations rather than functional calculations. Implications for how schools and districts can make better choices about reform designs are discussed.

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Introduction

Urban districts around the United States are attempting systemic change by offering schools support for adopting various externally developed school restructuring models (Slavin, 1995). This movement marks a shift away from the belief that the best way to reform schools is through grass roots, local school efforts. The passage of the Comprehensive School Reform Act in the U.S. Congress in 1997, a bipartisan initiative which allocated $150 million federal dollars in fall of 1998 to schools willing to adopt research-based reform programs, is spurring an even greater use of external models for whole-school reform.

The New American Schools Corporation (NAS) is a key player in the external reform design movement. Created in 1991 as a response to Goals 2000, New American Schools was charged with securing financial support from foundations and corporations to fund new designs for "break-the-mold" schools (Bodilly, 1998; Hatch, 1998). Guided by the belief that the power of changing one school at time is limited, NAS has attempted to effect large-scale reform by bringing a "menu" of school restructuring models to numerous partner districts, including Cincinnati, Memphis, Philadelphia, San Antonio, and Miami-Dade (Kearns & Anderson, 1996; New American Schools, 1997). The NAS school restructuring designs currently include Roots and Wings, ATLAS, Modern Red Schoolhouse, Co-Nect, Expeditionary Learning Outward Bound, Audrey Cohen College System of Education, and National Alliance for Restructuring Education. (For detailed descriptions of the NAS designs, see Stringfield, Ross, & Smith, 1996).

The Memphis City Schools urban district was selected in 1994 as an NAS scale-up jurisdiction. The district serves a population of approximately 108,000 students, 82 percent of whom are African-American and 18 percent of whom are white; 65 percent of the students in Memphis qualify for free or reduced price lunch. The district's decision to partner with NAS was motivated by Superintendent Gerry House's interest in system-wide school restructuring in order to improve student achievement. At the same time, the district was in the process of developing content and performance standards to guide curriculum planning, classroom instruction, and outcomes assessment in its schools, and it was interested in supporting school reform (Stringfield, Datnow, Herman, & Berkeley, 1997). In addition to offering schools support for adopting six of the NAS models for school restructuring, Memphis City Schools decided to offer two other restructuring designs to the schools, Paideia and Accelerated Schools. (Appendix A provides a brief description of each design made available to schools in Memphis.)

The Special Strategies study (Stringfield et al., 1997) concluded that, in general, schools were more successful in implementing reform when local educators were able to

explore numerous options and choose a reform strategy they believed to be well matched to the needs of their particular school. Thus informed choice would seem to be a prerequisite for schools to proceed with effective implementation of a reform design. Yet, how can faculties who are relatively unfamiliar with the restructuring designs offered choose designs that are well suited to their students' needs and their own needs and interests?

To help provide schools with information about the reform designs, the Memphis consortium (which included Memphis City Schools and the University of Memphis) negotiated with NAS and the two other developers to offer a multi-year "education exposition" in Memphis (Ross et al., 1997). In April 1995, the first exposition was held in Memphis, where design teams exhibited their school restructuring designs to teams of educators from Memphis City Schools. Teams of educators from all 161 schools were invited to study the eight restructuring designs and to send groups to the exposition. Teams from 97 schools attended the exhibition. After attending the exhibition, schools were given a month to gather additional information through meetings with design team representatives, interactions with trained staff from the Memphis City Schools Teaching and Learning Academy, and videos and printed information about the designs. The district also provided schools with a "self-evaluation checklist" to assist schools in making decisions about reform (Ross et. al., 1997).[1]

Schools that were interested in adopting particular designs were required by the district to obtain approval from 90% of their leadership council and from 60% of their staff (through a vote) and were required to submit a signed letter of intent to the district. Fifty-eight schools submitted letters of intent and 34 were approved by a review committee at the district (Ross et al., 1997). Stringfield and Ross (1997) reported that:

> Many faculty and principals expressed an enhanced sense of ownership of their design as a result of the initial process. At the same time, teachers at several of the first cohort 34 sites expressed frustration that they had not received more information on the diverse designs earlier. They felt that their vote was not fully informed. In a few instances, one or more teachers expressed the opinion that the eventual choice of a strategy did not appear to reflect the desires of the majority of the staff. Not surprisingly, those teachers who expressed the greatest ambivalence about the level of information preceding the choice typically expressed the least enthusiasm for the specific design being implemented in their school (p. 152).

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[1] The district's process for providing schools with information about designs has been refined since the early years of the restructuring initiative. The data reported in this report were based on design choices made by school staffs during the 1995-96 school year.

Researchers from the RAND Corporation, who are conducting a nationwide study of the NAS scale up, reached similar conclusions. They found that the choice process undertaken by schools in the first year (1995) was "rushed and confused," and that lower implementation levels resulted when schools felt forced to adopt designs, felt improperly informed, or encountered strife and tension prior to design adoption (Berends & Bodilly, 1998, p. 23)

Thus the first cohort of Memphis schools involved in choosing a design seemed to vary in the degree of informed choice exercised. For our study, we decided to examine a sample of the second cohort of Memphis schools — those who attended the design exhibition the following year — with expectations that we would see more clarity of purpose, information, and communication across the board. We hypothesized that most of these second-year schools knew what they were getting into on the front end and were starting this process with stronger buy-in from faculty. These schools had "experienced" schools to interface with and observe before making choices. Also, we expected that one year of experience would also bring improvement in local district support and in the presentations of information by the design teams.

The key questions guiding this analysis are: *How and why do schools choose particular reform designs? Given how choices were made, what can be said about the schools' early implementation experiences? Specifically, do schools that seem to make more informed choices have stronger initial implementation of their reform designs?* These questions are addressed by examining interview data collected in a sample of second cohort schools in the context of sociological theories of organizational behavior. With the growing use of externally developed whole-school reform models, it is critical to learn how educators choose among different reforms, and how this choice process can potentially be improved.

Theories of Organizational Behavior

Theories of Informed Decision Making

Change often leads to uncertainty and new challenge for schools, particularly when the reforms being introduced are entirely new and unfamiliar (Hatch & White, 1998; Leventhal & March, 1993). Ideally, schools would choose particular reform models based on informed decision making about the fit between the reform and the schools' functional needs. In theory, by simply giving schools enough information to make an educated choice of reform, a successful fit is likely. Part of maximizing a school's well being would constitute choosing a reform that fits with the needs of the school and with theories of change

held by the educators in that school. For example, in one school, educators might feel that their students' primary need is to see a purpose in their education, and thus they might choose the Audrey Cohen System of Education because it emphasizes this element. Or, educators interested in locally developed change might choose a design that requires some degree of indigenous invention (e.g., Accelerated Schools), whereas those who feel they would prefer to leave the development of the reform to someone else would choose a specified, comprehensive design (e.g., Roots and Wings). According to this ideal theory of informed decision making, the chosen reform would be one which most everyone at the school favors and has sufficient knowledge of to make an informed decision.

Theories of Bounded Rationality

Several organizational theories would question whether the choice process is so neat and clean, due in part to individuals' inevitable cognitive limits to assemble and digest large amounts of complex information (Simon, 1957). People do not always use available information when making decisions. This may be true even if local educators are provided with information gathering opportunities, as they were in Memphis.

The theory of "bounded rationality" would suggest that organizations, which are comprised of individual decision makers, have limited rational decision making capabilities, perhaps because individuals have too much information, unreliable information, or not enough (Simon, 1957). Due to bounded rationality, organizations may not be able to maximize the use of information to make decisions: "In practice, individuals and organizations consider only a relatively small number of alternatives, and frequently stop searching once they find a tolerable course of action, rather than seeking the best possible" (Black, 1997, p. 37). This is known as *satisficing* behavior (Simon, 1957). In the face of massive information and uncertainty, schools (organizations) may make choices on what satisfies the requirement to reform but which may not necessarily be optimal for their school. In sum, the theory of bounded rationality in decision making would suggest that we cannot assume that good information will lead to good decision making. In reality, we never use all of the information provided to us, so what we are really looking at is a continuum of how much or how little information is used in decision making.

In addition, in the face of limited information or time, uncertainty about which reform to choose, or even as a part of prudent choice making, a school may choose to model or *mimic* the reform model choices of other schools: "Organizations tend to model themselves after similar organizations [that] they perceive to be more legitimate or successful" (Dimaggio & Powell, 1991, p. 70 in Goldman & Conley, 1996). Schools may choose models

because other schools they are familiar with are choosing or have chosen the same model. The decision to mimic another school's choice of reform model may be based on the success of the model in meeting the needs of a similar population of students. In these cases, mimicking can be good decision making. On the other hand, schools may choose to mimic other schools' choices for reform regardless of whether the reform itself has proven effective, or whether their school is really that similar in terms of organizational history. In this regard, mimicking may not be very effective.

Theories of Legitimacy

In addition to recognizing the limits of the use of information for decision making, recent organizational theory has proposed other explanations for organizational behavior outside of maximizing (or even satisficing) functional needs. For example, schools might choose a reform simply for the purposes of legitimacy (Scott, 1998), which can be achieved simply by showing external (often superficial) compliance. To conform to a district's initiative for reform, a school may choose a model with little concern about what the outcome might be, but simply because the act of choosing a reform in itself provides rationale and justification for their actions (ibid.). The school does not necessarily need to have chosen well as long as its choice achieves legitimacy in the eyes of the district. This act of choosing illustrates that "Organizations often react to their rule environments through symbolism as well as through substance" (Suchman & Edelman, 1997, p. 918).

A school might adopt a particular restructuring design because it is the closest to its current organizational model or practices and thus, in effect, requires little change. Action is not motivated by an informed calculation of ability to achieve school goals through a particular choice, but rather is based on an interest in maintaining the status quo (Suchman & Edelman, 1997). Still, they are able to achieve legitimacy. According to this theory, schools would choose reforms that would be easiest to implement in terms of ceremony but not in real practice. This allows them to display "structural elements that conform to institutionalized conventions, and at the same time, preserve some autonomy of action" (Scott, 1998, p. 212). This is also an example of the "decoupling" that exists between a school's functional and symbolic structures (Meyer & Rowan, 1977).

Non-Rational or Normative Theories of Action

Finally, reform choice could also be governed by less obviously functional or instrumental reasons. For example, reform choice may be governed by school cultures,

educators' emotions, or power relations in the school, rather than by any sort of informed calculation of the costs and benefits associated with particular paths of action (Alexander, 1987; Datnow, 1998; Hargreaves, 1998). This viewpoint ascribes a normative or "non-rational" base to actions, rather than viewing choice behavior as goal oriented or utility maximizing in any way (Alexander, 1987; Petracca, 1991).

Choice of reform may in fact be motivated by a combination of these theoretical explanations. However, central to this discussion is an assumption that educators in schools are in fact active choice makers of reform models. Institutional environments are not purely deterministic of people's actions. As Mehan (1992) argues, "Social actors [do not] function as passive role players, shaped exclusively by structural forces beyond their control; they become active sense makers, choosing among alternatives in often contradictory circumstances" (p. 3). Choices for reform are likely to be the product of a dynamic relationship among structural constraints, culture, and peoples' actions in many interacting sites and settings.

Methods

The interview data for this investigation were collected as part of a larger longitudinal study of the Memphis Restructuring Initiative conducted by researchers from Johns Hopkins University and the University of Memphis for the Center for Research on the Education of Students Placed At Risk (CRESPAR). The study design is multi-method with data collection strategies including classroom observations, interviews, questionnaires, and reviews of student records and other pertinent documents. (For a detailed description of methodology, see Herman & Datnow, 1997.)

The qualitative data analyzed in this report were gathered during the 1996-97 school year. School visits were conducted in March and April, 1997, six or seven months after the schools had begun implementing the restructuring designs. The CRESPAR team visited a subset of 6 of the 14 second-cohort schools, chosen because each was using a different restructuring design, to conduct interviews with principals, teacher focus groups, and informal classroom observations. Teachers were chosen at random by the research team for the focus groups, which involved 8 to 10 participants in each school. Both the principal interviews and the teacher focus group discussions were taped and transcribed verbatim at the completion of the visits. Principals and teachers signed release forms allowing for their participation in the study and were assured confidentiality in their responses. For this reason, pseudonyms are used for all school and person names throughout this report.

During the interviews, teachers and principals were asked to describe the process they engaged in when selecting a school restructuring design (i.e., why they chose a particular design, who was involved in the decision, how the decision was made, etc.). Educators were also asked to describe what was done to prepare the faculty for the implementation of the design, what elements of the design they had implemented thus far, what they viewed as the major successes and challenges they faced, and what they thought to be the school's long-term prognosis for implementing the reform design.

The interview data gathered at each school were analyzed through the coding of transcripts and the creation of within- and cross-case data displays in order to note patterns in the data (Miles & Huberman, 1984; Yin, 1984). Subsequently, the data were examined in the context of the theoretical framework presented earlier (Eisenhardt, 1989).

Reform Choice and Early Implementation

In this section, I integrate the qualitative data and organizational theory through descriptions and analyses of how each of the six second-cohort schools chose their restructuring designs. I also consider the relationship of the choice process to early implementation experiences in each school.

Rose Elementary School

The choice process. The choice of the Roots and Wings design at Rose Elementary School was based on reasonably well informed decision making, fitting close to the "ideal" of how the choice process might work. Initially, in the first year of the district restructuring initiative, a leadership team from Rose attended the exposition and brought back information on two designs: Roots and Wings and Modern Red Schoolhouse. The school staff voted to become a Roots and Wings school because they thought it met their school's primary need, which was to improve students' reading skills. A teacher stated: "We couldn't move into a Paideia or a Co-Neet model or some of the project-oriented, higher order thinking, group-skill type things until we addressed our main problem, which was reading." Another teacher reiterated: "We were mostly concerned about our school location, the environment, and the social changes, and we felt the reading program would best benefit our children here."

The teachers at Rose seemed to have considered what needed to change at their school. They identified their weaknesses and saw the Roots and Wings restructuring model as directly addressing some key problems at their school. However, because they only

investigated two models in detail, they may have been operating on limited information (thus, bounded rationality). Still, of the eight designs, Roots and Wings is in fact most geared toward improving students' reading skills. In addition, unlike in most of the other schools, educators at Rose did not speak of feeling pressured to adopt a restructuring model.

The school's application to become a Roots and Wings restructuring school was not approved by the district in that first year. Nevertheless, they implemented the Success for All reading component of the model in the primary grades, using Title I funding. When a new reform-minded principal came on board the following year, they again looked into applying to become a Roots and Wings school. The principal took eight teachers to the Roots and Wings national conference. After returning, the teachers made a presentation about the model to the rest of the staff. Teachers at all grade levels were given the opportunity to visit nearby Roots and Wings schools and many of them did. Teachers from a first-year cohort Roots and Wings school also visited Rose to talk with teachers. About the information gathering process, the principal explained: "We tried to look at different situations so that people could get as good a feeling for the program as possible." Another vote was held. One hundred percent of the teachers voted in favor of again applying to become a Roots and Wings school; two teachers abstained from the vote and chose to transfer out of the school.

Early implementation progress. In the spring of their first year of implementation, the reading component of Roots and Wings was being fully implemented in grades K-4 at Rose, and the school planned to add other subjects and grades 5-6 in coming years. By and large, the teachers were pleased with the improvements Roots and Wings had brought. A teacher stated: "Everyone is reading" and "the students feel better about themselves because they can do the work." Another remarked: "For the first time I have seen children take responsibility for their own learning." She added: "A lot of people have not worked in cooperative groups traditionally here. That's changing. More and more teachers are, and more and more students are."

However, the teachers at Rose expressed some frustrations in initially learning to change their practices. In addition, some of the materials arrived late (not in time for the start of the school year) and teachers found the paperwork required by the design to be burdensome. Also, the teachers felt that they could have used more extensive training. However, they liked the fact that their design includes an ongoing relationship with the design team. As one teacher noted: "They come to the school quite often." And, another teacher stated, "It demands a lot of you... but the payoff is wonderful."

This school has a very supportive principal and program facilitator who have helped with implementation by providing teachers with the resources they need and making the 90-

minute reading time free of interruptions. The principal has also been very active in continuing to gather research on Roots and Wings and sharing it with her staff. Overall, the educators at Rose identified the key problem at their school, sought a reform that seemed to provide a solution, and have begun implementing it wholeheartedly with enthusiasm.

Rose Elementary is unique among the six schools in the study in having made what appeared to be a reasonably informed choice that matched well with their school's goals. Still, they considered only one model in great detail, suggesting some degree of bounded rationality, or more specifically, satisficing.

Begonia Elementary School

The choice process. At Begonia Elementary School, an Expeditionary Learning Outward Bound (ELOB) school, the choice of this restructuring design seemed to involve a moderate amount of information gathering. The principal provided teachers with printed information about all of the restructuring designs. Subsequently, two teachers went to the exposition along with a former principal and a parent and brought back more information about three designs for the rest of the staff. Teachers also called their friends in other schools to get information, but none visited schools that were already using the designs. "We narrowed it down to two," explained another teacher, "Accelerated and ELOB, but we couldn't get Accelerated because our reading scores were not low, and that was geared to schools that were below a certain percentile in reading." This comment reflects the fact that teachers were uninformed about Accelerated Schools, as the model does not specifically address reading nor is it only designed for particular types of schools. The teachers admitted that they did not feel fully informed. One teacher thought that they would not have enough information "unless every person here went to see every one of the designs." Still, there was a series of three votes, and finally a majority voted in favor of ELOB.

The comments by the teachers about the lack of information and the incorrect information about the Accelerated Schools reform suggests that the educators at Begonia engaged in bounded rationality (or specifically, satisficing) in the process of choosing a reform design: They made a decision early on to consider only a small number of alternatives, had unreliable information on one of the reforms that they considered seriously, and none of them visited other schools using the designs they were considering. The choice process was also motivated by an interest in legitimacy as well as relations of power. The educators at the school knew the district wanted them to restructure and felt forced to choose a model.

One of the reasons the teachers at Begonia Elementary chose ELOB is because it seemed easy to implement — it matched with their current practices. Again, this suggests an interest in legitimacy. As one teacher explained, "A lot of the philosophies of [the design] were a lot of things that teachers were already doing." The principal concurred: "We had some team teaching, we had multi-age grouping, so it just fit." The school had undergone some goal exploration as part of developing their school improvement plan the year prior, and the teachers felt that the plan "matched up" with the design.

Early implementation progress. Some teachers were surprised that although they had chosen a design that seemed to fit with their current direction, they were involved in more reform than they initially planned on. This led some of them to conclude that they must not have been fully informed at the outset. One teacher stated: "We were ready to go into a new design, but I don't think we knew how much changing we were going to have to do." In fact, some of the changes teachers reported making were quite dramatic. "ELOB has made us a little more daring," explained a teacher. Traditional teachers reported unbolting the desks from the floor and reorganizing the room so that kids could work together. "My room is more child-centered... I'm in the background, ... they're running the show," explained one teacher. Teachers felt that the training they received was very good, but still they had to learn by doing.

Teachers reported that both students and teachers were collaborating much more, and that students were taking more responsibility for their own learning. Although the teachers at Begonia discussed doing lots of extra work, spending lots of their own money on materials, and being stretched for time, most teachers were excited about the changes that ELOB had brought to their classrooms. They described themselves as "charged" about their teaching. Parent involvement reportedly also increased. Finally, the teachers felt that formerly low-achieving students were benefitting from the project-based approach of the ELOB model.

The teachers provided elaborate descriptions of what they had changed in their classrooms and the new interdisciplinary units they had developed. This school was off to a fast start in their first year of implementation. The principal worked hard at creating a culture and enthusiasm for change, and she was a very active leader in pushing the reform. This leadership undoubtedly influenced the school's early implementation success, as another school might have had more difficulty when they realized that the restructuring design they had chosen was more than they bargained for initially. In fact, this was the case for Calla Lilly Elementary.

Calla Lilly Elementary School

The choice process. At Calla Lilly Elementary School, the choice of the Paideia design appeared to be based almost entirely on the purpose of achieving legitimacy as a "restructuring" school. They conducted some information gathering before making a choice; however, the compulsion to reform appeared more salient than the information in their decision making process. The principal of Calla Lilly Elementary explained that they initially looked into adopting a design in the first year of the Memphis Restructuring Initiative: "They had some information sessions... But the way they did it, you had to decide before you went which two you wanted... You could only go to two." (It seems as though bounded rationality — the quick reduction to a small number of options — was almost structured into the process, according to the principal.) The educators at Calla Lilly were interested in a third, but found out about that design from teachers from other schools. In the second year, teachers from Calla Lilly visited three first-year schools using different designs: Accelerated Schools, Co-Neet, and Paideia schools. However, they stated that they did not talk with teachers; they toured the schools and observed some classrooms.

The teachers reported that they felt that they had to choose a design because their principal impressed upon them the need for doing so. They chose the Paideia model because it appeared to require the least amount of actual reform. As one teacher explained, "It seemed like the easiest one to implement without making a lot of changes." The teachers did not feel that the school had much need for restructuring. Students' test scores had historically been high and the school enjoyed a good reputation in the community. However, the staff was under the impression that if they did not choose a design now, a design would be chosen for them within a couple of years. They said that they did not have sufficient information, even though, as one teacher stated, "We specifically asked, 'please tell us everything on the front end.'" They felt that they were not given "direct answers" to their questions from the design team. Nevertheless, after examining the information they gathered from printed materials and from site visits, a vote was held. Sixty percent of the teachers voted in favor of the Paideia design and they moved forward with implementation.

After adopting the design, the teachers realized that there was a lot more to it than they had imagined. As one teacher explained: "It looked like one thing, and then once we accepted it, then it comes up it's all this other stuff too." After they began implementation, they visited schools in a nearby city that had been implementing Paideia for several years. However, the teachers and the principal concurred that they saw no evidence of implementation on these visits, and thus they were not helpful.

Early implementation progress. In the spring of the first year of implementation, the teachers at Calla Lilly reported implementing one component of the Paideia model, the weekly seminars, but this component significantly affected instruction for only one hour per week. In fact, when I asked a teacher how I would know it was a Paideia school if I visited her classroom at another time of day, the teacher responded, "You'd see the sign under my clock." The teachers complained that they did not have the common planning time needed to make their seminars go well. They had apparently asked the administration repeatedly for this time, but were not granted it, and deduced that "it must not be a priority." At the same time, the principal reported numerous actions to attempt to support the reform. There seemed to be strained relations between the site administration and the staff. The teachers also claimed that they did not have the resources they needed for reform, and that this was in part because, as someone from the district apparently told them, "Paideia is not a true reform and so you will not be getting the extra money that the other schools do."

Nevertheless, the teachers reported seeing some positive effects from their one-hour per week seminar. Students were reportedly more respectful of each other when working in cooperative groups and were referring back to their texts more for information (something which the Paideia model encouraged). One teacher said she was more conscious of facilitating discussions among her students. However, on the whole, implementation was slow and teachers were frustrated by their experiences with the design team.

It appears that the educators at both Calla Lilly and Begonia made choices on the basis of legitimacy and bounded rationality. Differences in the early implementation progress at these two schools may be explained by differences in the school cultures (i.e., Begonia was oriented toward change), administrator-teacher relations (i.e., micro politics and tension were evident at Calla Lilly), and relationships with the respective design teams. Moreover, the teachers at Begonia seemed to be more open to change than those at Calla Lilly. The teachers at Calla Lilly had very strong negative emotions about the entire choice process and early implementation experience.

Stargazer Elementary School

The choice process. At Stargazer Elementary School, the choice of the Accelerated Schools model appears to be explained by mimicking behavior that was initially motivated by a quest to achieve legitimacy. However, the educators at Stargazer did work hard to find out as much as possible about their design before implementation, in part because they wanted a model that would dovetail with current practices. During the first year of the district's restructuring initiative, a committee of teachers and the principal read literature on

all of the models and then attended the exposition, bringing information from three models back to the staff for discussion. As the principal stated, "The handwriting was on the wall" — that is, "the emphasis of the superintendent is to have every school in a reform effort." The faculty and community decided that none of the models "fit into their philosophy, into what we were doing at the time," explained the principal. A teacher explained that they did not decide on a model the first year because "not enough information was brought back to us. We didn't have any schools we could go look at."

The following year, the school got on the reform bandwagon, but through a different route: They chose to mimic the design choice of another school. The principal explained: "A dear friend of mine is a principal at one of the second-year Accelerated Schools... and we'd meet and she'd talk about her process. And I thought, well, that just makes sense." The principal then arranged for almost every teacher to visit the school already using the Accelerated Schools design. During this visit, the teachers (and some parents) from Stargazer were able to sit in on meetings and talk with teachers. Although the staff of Stargazer gathered lots of information on Accelerated Schools, they did not look into any other designs in the same way. The choice of reform at Stargazer is an example of bounded rationality or, more specifically, satisficing, as the number of options they seriously considered was quickly reduced. This was driven in part by a desire to simplify the process by mimicking the choice made by a nearby school.

Ninety-two percent of the staff then voted in favor of adopting the Accelerated Schools design, and they felt they did have genuine decision-making power. Nevertheless, as the principal stated, "of course not everybody's on board." A teacher confirmed this: "Everybody really liked the design, but I don't really know that all the teachers would have chosen to take on a new design if they had not been pushed." The teachers worried that if they did not choose a design at that time, one that was "more painstaking work" might be foisted upon them in the future. These statements point to an interest in legitimacy as governing their involvement in reform initially, but, in fact, the fit seemed to be good as well. For example, when asked why they chose Accelerated Schools over other models, echoing the sentiments of her colleagues, a teacher explained: "I really liked the model because it seemed like a less painful route into restructuring the school... It was basically taking what we were already doing and seeing what we can do to make it better." Another teacher stated: "This school was already on target to start with." The principal also thought that the Accelerated Schools model fit well with her own philosophy of leadership. Teachers corroborated this point and said that they felt very supported by the principal.

Early implementation progress. In the spring of the first year of implementation, the principal observed more of an emphasis on hands-on activities. A number of teachers

reported that they had incorporated some of the philosophies of the restructuring design and some were teaching in a more child-centered way in their classrooms as a result. Three people at the school had been trained as coaches, and the school planned to do the model's Vision Celebration. They had also done the "taking stock" portion of the design and completed the surveys. One school coach thought they were further ahead than some second-year schools because they had been able to learn from the experiences of those schools. Teachers really felt that they needed additional planning time. However, two major features of the Accelerated Schools model had not yet been implemented — the schedule and the governance structure.

Jasmine Junior High School

The choice process. At Jasmine, the choice of the Audrey Cohen System of Education can also be explained through the use of limited information, or, specifically, satisficing and mimicking. Jasmine sent a committee of teachers to the exposition to gather information on the various designs the first year; however, the faculty did not vote to adopt a design. When the opportunity to select a design was provided the following year, the principal of their feeder elementary school implementing the Audrey Cohen model encouraged the former principal of this school to adopt the design. "[The principal of the elementary school] is a major drum for the program," explained the principal of Jasmine. As one teacher stated: "The (former) principal suggested that the faculty jump on the bandwagon." After meeting with the teachers at that school (but not visiting classes), the staff reluctantly agreed to go along with it. They did not choose among multiple designs; the vote was "yes/no" for or against Audrey Cohen. The majority of the staff voted in favor because, as the current principal stated, "The previous principal said 'Well, we might as well get on board because it's pay now, or pay later,'" meaning that eventually they would have to choose a design. Power was a key element in forcing the choice of a reform.

The teachers reported that the visit to the elementary school already using the design did not give the teachers sufficient understanding of what it would look like in practice. One teacher explained: "We didn't actually visit the school in operation... We heard testimonies." Another teacher added: "I think this is the first junior high that tried this model and therefore we haven't been able to see anything that we can use as a guide." When asked why they chose Audrey Cohen (aside from the principal's push), a teacher explained: "They made it sound so easy to work into your regular program." However, they later found the design very difficult to incorporate. It was going to require far more change than they had initially bargained for.

The current principal was upset over the choice process not being fully informed: "I'm concerned about the match and how much background information was given, or was really digested and analyzed. Because every model is not right for every school." He added: "I don't know if there was an intensive survey done of all the models by this staff." In fact, in assessing the school's needs and the community's interests, he thought that the Modern Red Schoolhouse design might have been a better choice.

Early implementation progress. After the first year of implementation began, apparently the teachers asked to visit other schools, but were reportedly told that they were not allowed because the school's plans were secretive and copyrighted by Audrey Cohen College. A teacher said: "They [the design team members] were afraid for us to go see how the program would work... We just couldn't understand. We're all Memphis City Schools. Why are we pulling away instead of working together...?" Needless to say, this frustrated teachers.

There was considerable resistance to implementation among the staff. One teacher explained: "There wasn't a widespread desire for it.... It's here, and we deal with it." Teachers also noted that support for implementation of the design actually decreased over time as they found it unworkable in their school context. This was raised in various ways. One teacher stated: "I don't think it's a bad program. It's just for this school it doesn't seem to be working." The principal stated: "This is still Jasmine and it's Tennessee. It's not going to look like whatever junior high in North Carolina or wherever. It's not." Yet, the teachers felt that no matter how poorly it worked in their school, they had to do the program, at least on paper. A teacher explained: "It has been stated by high officials in meetings that we cannot drop the program once we started it."

The principal was attempting to make the design workable for teachers, but he was not pushing for it wholeheartedly. Levels of commitment to the model were low overall and implementation was slow. The teachers had difficulty in interacting with the design team. The principal explained that they felt like "guinea pigs" who were testing the program but, at the same time, being forced by the design team to do the program "to the letter" when it didn't fit well with their school.

In sum, feeling pressure to reform, the former principal encouraged the staff to adopt the model of their feeder elementary school, without sufficient knowledge about whether it would work in a junior high setting. The staff experienced frustrations with the design team, they were dealing with their fourth principal in four years, and enthusiasm for the design was at a low level. Reform has progressed slowly.

Wisteria Secondary School

The choice process. At Wisteria Secondary School, the choice of the ATLAS reform was also not fully informed. In fact, only one model was investigated in great detail — mainly because the principal saw it as the path of least resistance. In other words, it was chosen for legitimacy purposes, but also through a process of satisficing. The School-Based Management Team (which included 5-7 teachers) at Wisteria investigated various options. Apparently, the principal encouraged them to settle on the ATLAS design because it was the "least intrusive," explained one of teachers. The team gave a presentation to the faculty about the ATLAS design and provided them with written materials about the model. A teacher explained: "We were given very little information about each one. And none of us knowing anything about the different models, or very little about them, we made a momentary choice because that is what we were supposed to do." Some teachers could not even remember voting. In other words, the principal, occupying a position of power, was able to coerce the staff to go along with his chosen reform.

The assistant principal noted that the faculty voted in favor "with the knowledge that more than likely every school would be doing restructuring and there was money available for training at this point." The assistant principal believed that it did not matter which model they choose, because the models were "ninety percent the same." Teachers were extremely tentative about ATLAS, even at the time of the vote, and had little faith in the program being able to address their major problems, which were low attendance, large class size, and a significant portion of students who lacked basic reading and math skills. Some teachers saw the problems as external to the school, describing them as "societal." Some teachers also resented the fact that the district restructuring plan presupposed that what they were doing currently was not working.

Early implementation progress. During the first year, the faculty was frustrated. They felt that they had not received sufficient training. A teacher thought that the design team had "come to us with a lot of different theories" but no "practical application." He reported that the ATLAS methods were so vague that he did not know whether he was using them or not. Moreover, another teacher argued that the vocabulary used by the design team was unfamiliar: "It was like going to France when you don't speak French." As the assistant principal explained, "We're doing something that's ending up taking more time, and we don't see any positive results from it yet." She added: "There's a lot that is abstract and 'do what works best in your community,' and I think that is another frustration of teachers. What they want is 'somebody tell me how to implement this model'... And they're not getting the answer to that." The teachers felt that the model was doomed to failure at the middle or high school level; it had to begin at the elementary level first.

The reported changes in the first year were the move to modular scheduling and the development of two ATLAS curriculum units by ATLAS study groups that meet weekly. The assistant principal reported that there was more group work in classrooms, yet the teachers complained that it was unworkable given the students' lack of social skills. The teachers did feel that they themselves were collaborating more. Despite these changes, the assistant principal thought that implementing the model was going to be a struggle, particularly given the low level of enthusiasm among the staff.

Discussion

Analyzing the data collected in the Memphis schools in the context of organizational theory suggests that most schools did not make well-informed decisions about restructuring models, even though more opportunities to gather information were available than for the first cohort of schools. In fact, informed choice occurred in only school (and even there they did not consider multiple options seriously) and partially occurred only in a couple of others.

As a result of their structurally and culturally situated experiences, educators acted in a variety of ways in response to choosing reforms. For example, educators in most schools operated in ways that were boundedly rational: they typically considered only a small number of reforms (in some cases only one or two) and stopped gathering information when they found a tolerable course of action. Overall, they engaged in satisficing behavior. "Good" choices, in the eyes of many school educators, were those that cohered with current practices, asking them to refine or enhance what they were already doing, not dramatically restructure. Some educators chose reforms that appeared easiest to implement in terms of ceremony, allowing them to display structural elements that conform to district policies and, at the same time, preserve the status quo in school. School change expert Michael Fullan (1991) calls this *symbolic* change. Some schools elected to mimic another school's choice of reform, often because of uncertainty about which to choose.

Not surprisingly, in schools where educators were better informed at the outset and where there was strong buy-in, there were greater successes in early reform implementation. In two cases (Begonia and Stargazer), reform had begun even though the choices were not well informed, in part because of the presence of strong leadership at these sites, a school culture which supported change, and positive experiences with the design teams. These suggest the existence of normative and interactional features to the reform choice process. At other sites (Wisteria, Jasmine, and Calla Lilly), the prospects of early change were

predictably more dismal. This may change over time, as the data gathered in the first year of these schools' reform efforts are clearly preliminary.

The choice process was strongly governed by the fact that most of the schools had legitimacy — seeking approval in the eyes of the district — as their primary goal. Clearly, the reform implementation process is not power neutral and choices are not free. Rather, incumbents of some positions (i.e., district administration) have the power to impose policy on others. The strong push for restructuring from the district level led few educators to question whether or why they needed to reform their particular school. In fact, educators in a number of schools saw no need to restructure or change. The process of choosing a reform did not necessarily lead them to reflect on what the problems were at their school or, if it did, it led them to conclude that the problems were external to the school. Not surprisingly, these schools chose the path of least resistance for legitimacy purposes only. For them, the best fit was a reform that required them to make only superficial changes and nothing more.

These findings show the need for educators to engage in critical inquiry about the current state of affairs at their school before decisions about restructuring designs are made. Teachers need to be encouraged and empowered to identify school level problems and consider how the various reforms may help solve these problems (Hargreaves, 1996). According to Sirotnik and Oakes (1986), this inquiry process should ideally be characterized by "free exploration, honest exchange, and non-manipulative discussion of existing and deliberately generated knowledge in light of critical questions like: What goes on in this school? Who benefits from the way things are?" (p. 39). The critical inquiry process can play an important role in choosing the right reform and in promoting long-term teacher development and empowerment for change.

The findings presented in this report point to the need for a careful process for providing schools with choices for restructuring, particularly historically poor performing schools. Kelley (1994) notes that when schools "are characterized by a lack of communication, distrust, and demoralized employees, the model — no matter how useful — is unlikely to succeed in improving organizational performance" (p. 8). "Reculturing" must occur in schools (in part through critical inquiry) before successful choices about restructuring can be made. Reculturing is defined as "the process of developing learning communities in a school, i.e., going from a situation of limited attention to assessment and pedagogy to one where teachers and others routinely focus on these matters and make associated improvements" (Fullan, in press). Hargreaves (1994) argues that those who push for structural changes "underestimate the traditions, assumptions, and working relationships that profoundly shape existing practice. Consequently, they also overestimate the power of structural changes to alter such practice" (p. 255). Choice of reform should be rooted in a

deep understanding of the norms and culture of the school, which includes an understanding of how reform has operated as part of that school culture in recent years.

In addition, the ways in which educators use information when making choices provide some cause for concern. Few educators were well informed about their chosen designs at the outset. Some chose to ignore opportunities to gather information, even when these opportunities would have greatly helped them in making better choices. Carol Weiss' (1995) research on shared decision-making reforms in high schools sheds some light on this issue. Weiss found that teachers got most of their information from experience, and tended not to mention information from journal articles, staff development, or conferences as sources for decision making. Teachers typically turned to other teachers for information (including teachers in other schools who had experience with a particular model or issue). On the other hand, principals were more likely to draw on information from professional journals, meetings, and conferences. For teachers, the "lack of extensive information coalesced with self-interest in the status quo and was reinforced by selective attention to those elements in their value system that stressed continuation of present practice" (p. 588). Weiss' findings are consistent with those from this study, which suggest that choices are governed in part by the past experiences, interactions, and ideologies of educators — and not by a full analysis of written information which is provided.

Implications

To be more effective, the model for district-wide reform wherein schools are provided with an array of choices needs to be improved or considered in light of its limitations. In fact, the Teaching and Learning Academy at Memphis City Schools has refined the process since the first year to provide greater opportunities for schools to gather and digest information about the designs before making choices. Still, as the findings presented here and in the research by Weiss (1995) suggest, this does not guarantee that schools will exercise more informed choices. Schools are complex organizations that do not always behave predictably in the face of change.

Several implications evolve from this research. First, educators need to engage in a *thorough* and *genuine* process of identifying their school's needs and problems so they can choose a model (if there is one appropriate) or create their own change effort that specifically addresses their most pressing issues. Visits to other schools and meetings with staff already using the model should be more strongly encouraged. Design teams also need to be clearer about the elements that will be implemented so schools are fully aware of what they are

getting themselves into. Finally, schools need to be aware of what specific district support they will get for restructuring. Some faculties were confused about whether they were to receive extra funding and so forth. Most importantly, educators need more time to carry out the entire choice process.

Given these possible improvements in the process, some schools will still simply choose reforms because they feel they have to, regardless of whether in fact they are really being forced. And given the choice of the right model, there is still a complex web of factors that affect implementation success, such as general teacher receptivity to change, a strong (and consistent) school administration that supports restructuring, the level of support provided by the design team, an organizational structure and culture that supports change, and sufficient resources.

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Appendix 1
The Eight Restructuring Designs
Implemented in Memphis City Schools in 1996-97[2]

DESIGN	MAJOR CHARACTERISTICS
I. New American Schools	
ATLAS Communities (Authentic Teaching, Learning, and Assessment for All Students)	*Developer* Coalition of Essential Schools, Education Development Center, Project Zero, School Development Program *Primary goal* Develop pre K-12 pathways organized around a common framework to improve learning outcomes for all students. *Main features* • Pre K-12 pathways • Development of coherent educational programs for every student so that they develop the habits of mind, heart, and work they will need as informed citizens and productive workers • Authentic curriculum, instruction, and assessment • Whole-faculty study groups • School pathway planning and management teams For grades K-12. Training provided.
The Audrey Cohen College System of Education	*Developer* Audrey Cohen College, New York. *Primary goal* Development of scholarship and leadership abilities using knowledge and skills to benefit students' community and larger world. *Main features* • Student learning focused on complex and meaningful purposes • Students use what they learn to reach specific goals • Curriculum focused on Constructive Actions (individual or group projects that serve the community) • Classes structured around five dimensions that incorporate core subjects.
Co-NECT Schools	*Developer* BBN Corporation *Primary goal* Improved student achievement in core subjects *Main features* • Customized on-line on-site training and personal support and national "critical friends" program • Sensible use of the best available technology: schools need computers in every classroom that are centrally connected • Instructional emphasis on authentic problems and practical applications • Organization of schools into small learning communities • Flexible block scheduling; common planning time for teachers For grades K-12. Materials and training provided.

[2] This table draws information from *The Catalog of School Reform Models: First Edition*. Oak Brook, Illinois: Northwest Regional Educational Laboratory. http://www.nwrel.org/scpd/natspec/catalog

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DESIGN	MAJOR CHARACTERISTICS
I. New American Schools (cont'd)	
Expeditionary Learning Outward Bound	*Developer* Outward Bound, USA *Primary goal* High achievement for all students *Main features* • Challenging learning expeditions that involve authentic projects and fieldwork out of the classroom • High expectations for all students • Shared decision-making • Regular review of student achievement and level of implementation • At least 3 hours of team planning time weekly for teachers; flexible block scheduling; students with same teacher for more than one year For grades K-12. Training and some materials provided.
The Modern Red Schoolhouse	*Developer* The Modern Red Schoolhouse Institute, Indianapolis. *Primary goal* To combine the rigor and values of little red schoolhouse with latest classroom innovations. *Main features* • Challenging curriculum (Core Knowledge) • High standards for all students • Emphasis on character • Integral role of technology • Individual education compact for each student For grades K–12. Some materials and training provided.
Roots and Wings	*Developer* Robert Slavin, Nancy Madden, and a team of developers from Johns Hopkins University *Primary goal* To guarantee that every child will progress successfully through elementary school. *Main features* • Combination of research-based, prescribed curriculum with teacher-developed instruction in the areas of literacy, math, and social and scientific problem solving. Schools typically begin with implementation of the reading, writing, and language arts component called Reading Roots. • One-to-one tutoring; family support team; cooperative learning; on-site facilitator; and building advisory team. For grades K-6. Comprehensive materials and training provided.

DESIGN	MAJOR CHARACTERISTICS
II. Independent	
Accelerated Schools Project	*Developer:* Henry Levin, Stanford University *Primary goal:* To bring children in at-risk situations at least to grade level by the end of the sixth grade. *Main features:* • Gifted and talented instruction for all students through "powerful learning" • Governance structure that empowers the whole school community to make key decisions using the Inquiry Process • Three guiding principles: (unity of purpose, empowerment plus responsibility, and building on strengths) Primarily for grades K-8. Training is provided.
Paideia	*Developer:* Mortimer Adler, National Paideia Center, UNC-Chapel Hill *Primary goal:* Preparing each student for earning a living, being a citizen of this country and the world, and pursuing life-long learning *Main features:* • Socratic seminars: Small group sessions which use the Socratic method of questioning • Didactic instruction: Teacher lecturing which provides opportunities for "acquisition of knowledge" • One-on-one instruction from the teacher which takes place while students work independently and at their own pace For grades K-12. Training and some materials provided.

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